South Carolina’s forest products exports amounted to $1.04 billion in 2021. This represents an increase of 8.9% from 2020, which follows two consecutive years of declining exports. The state’s export industry remains structurally unchanged, as pulp and paper continue to be the main drivers of its economic activity. Similarly, solid wood products follow as the third sector in importance, whereas exports of furniture and equipment and machinery for forest products manufacturing still represent a small fraction of the industry’s total. Exports of wood chemicals are a notable exception, as their share of total forest products exports continue to grow year over year. All sectors but woodpulp experienced an uptick in exports in 2021. In 2021, forest products from South Carolina were shipped to a total of 122 countries around the world. The five export partners at the top of the list, in terms of export value, are practically the same as in 2020: China, Canada, India, Japan, Mexico. Some changes, however, can be observed in the general ranking of countries, as well as the inclusion of Mexico, now in 5th place. When taking all forest products into consideration, exports from South Carolina ranked 12 in the nation in 2021. Moreover, the state was 13 on paper, 8 on pulp, and 2 on exports of wood chemicals. Among the US Southern States, South Carolina is 8 on forest products exports overall, 6 on pulp, 7 on paper, and 12 on solid wood products. The contribution of the forestry sector to the State’s total export, which among other sectors includes vehicles, tires, equipment, and machinery, amounted to 3.5% of its total value ($29.7 billion) in 2021. On this regard, woodpulp and paper products ranked 10th and 11th among all 97 sectors respectively. In terms of the volume, forest products accounted for 31.5% of South Carolina’s exports in 2021, with pulp ranked number 1 among all sectors. Solid wood and paper products ranked fourth and fifth respectively.
Paper and Paperboard

Paper and paperboard products exports from South Carolina amounted to $413.5 million in 2021. This is a change of -7% from 2020, following a decade of continuous decline which somewhat mirrors the overall trend observed for the country in the previous years. More than half (51.3%) of paper exports in 2021 consisted of rolls or sheets of uncoated Kraft paper (HTS 4804). Approximately 33% of the state’s export of paper and paperboard remained in North America: 22% went to Canada and 11% to Mexico. Other top markets for South Carolina’s paper were China, Ecuador, and the United Kingdom. China was the top destination for shipments of Kraft paper. According to the trade data collected and published by the US Census Bureau, paper exports from the state to Canada and Mexico increased from 2020 through 2021. However, the value of shipments to other key partners, namely China, Ecuador, the UK, Germany, and Italy; decreased noticeably. This trend could be observed in the shipments of Kraft paper and other major commodities. Exports of uncoated paper and paper coated with kaolin were exceptions, as they mildly increased year over year.

Woodpulp

In 2021, South Carolina exported $441.4 million in woodpulp, mostly (80.7%) as non-dissolving grade chemical woodpulp (soda or sulfate), and as recovered paper and paperboard (13.4%). Compared to the previous year, this sector observed an increase of 20.1% in 2021, which follows the same trend experienced by other US states, following three consecutive years of declining exports. The top markets for exports of pulp from South Carolina are in China, India, and Japan. Together, these three countries accounted for 44.9% of the sector’s export that year. Moreover, the Asian markets’ share of woodpulp exports from the state was 62% in 2021. The European markets accounted for 15.5%. Presently, SC ranks 8th on export of woodpulp, compared to the rest of the country, by accounting for 4.6% of the value of all shipments.
Solid Wood Products

Exports of solid wood products amounted to $123.7 million in 2021, a 51% increase from 2020. This is in stark contrast to the sector’s performance over the last three years of shrinking exports and now brings back export levels slightly above those in 2014. Such a jump in exports was observed at the national level as well. Almost 41% of the value of this sector’s export in 2020 corresponded to lumber shipments. Export of logs accounted for 30%, and builder’s joinery for 21%. Around 38% of the value of lumber export corresponded to shipments of oak species, 35% to pines, 18% to poplar, and 9% to other species. Approximately 75% of the value of log exports from the state are of pine. The top destinations for log exports are India, China, and Vietnam. Lumber buyers in China, Vietnam, Pakistan, and India account for most of the exports from the state.

Fig. 6a. Solid Wood Prod. Exports

Fig. 6b. 2021 Top Products

Other Sectors

In 2021, wood furniture exports from the state were $4.03 million in total, representing less than 1% of South Carolina’s forest products exports that year. Nevertheless, it is an increase of 32.3% in the value of shipments from 2020, which follows a prolonged decline in trade affecting the state and the country in general. The wood chemicals sector follows the opposite trajectory, as it has grown almost continuously over the last two decades. The value of shipments in 2021 amounted to $53 million, 7.3% more than in 2020 and 14% above that of 2016. Two commodities account for the bulk of exports (97.6%) of this sector: residual lyes from the manufacture of woodpulp (e.g., lignin sulfonates) and tall oil (74% and 23.6% in 2021, respectively). China, Indonesia, and France are the leading destinations for exports of wood chemicals from South Carolina, especially residual lyes. South Korea and the Netherlands are also among the top six, mainly for exports of tall oil.
The goal of this report is to provide timely information on international markets and export activities that are and will be relevant for the development of South Carolina's forest products industry. This document offers insights on international trade of the state's forest products and the most promising destinations for each product category. Historic trade data is based on the U.S. Census Bureau’s “Origin of Movement (OM)” state export series, which is intended to measure state exports on the basis of transportation, not manufacturing origin. The included figures are presented to offer a perspective on the composition of exports from the state, on the basis of origin transportation. Publication date: April 1, 2022.

Notes

- As part of an effort to improve the accuracy of the statistics reported in this document, figures from previous years have been revised to account for the latest version of the Harmonized Tariff Schedule, 2021 Basic Revision 3. Similarly, to focus on the wood fiber supply chain, statistics related to exports of equipment and machinery used for the production of wood products have been removed from the document.

- For the purpose of this report, the term “forest products industry” encompasses five main sectors: wood-based chemicals, solid wood products, woodpulp, paper & paperboard products, and wood furniture. This categorization is based on the Harmonized Tariff Schedule (2021 Basic Revision 3) as follows. Solid wood products correspond to the commodities included in chapter 44. Paper & paperboard products are drawn from chapter 48, whereas woodpulp is based on chapter 47. The wood chemicals sector comprises headings 3803, 3804, 3805, and 3807 from chapter 38 (Miscellaneous Chemical Products.) The furniture here includes only wooden commodities from chapter 94.

- All trade figures offered in this study are sourced from the U.S. Census Bureau’s Origin of Movement Report Series, unless otherwise noted

- HTS: Harmonized Tariff Schedule Heading

- Publication Date: April 1st, 2022